CHAPTER 1

PREPARATION CHECKLIST

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Safekeeping of Papers and Valuables Papers to Take Overseas When you receive confirmation of your overseas assignment, you can begin initial preparations well in advance of your departure. You may wish to sort out household effects, put important papers in order, attend to medical needs, and complete post language and orientation programs. If you know where you are going and approximately when you will depart, you can also consult the Transportation Counselors to schedule your prepack survey and moving dates. Actual packing and obtaining tickets have to wait until travel orders are issued. The following checklists will help you organize yourself and your family for a smooth departure from the United States.

EARLY PREPARATIONS

Access to the Department of State for Family Members

Family members without diplomatic passports must have an appointment (or be cleared by an employee) to be admitted to most Department of State buildings. A picture ID, such as a passport or a driver's license, is required to get a visitor's pass. All visitors must be escorted at all times in the Department of State. Holders of U.S. diplomatic passports do not need escorts.

Any person who is enrolled in training at the George P. Shultz National Foreign Affairs Training Center (Shultz Center) will be issued a pass and will be admitted to the Shultz Center. Individuals without a Department of State or Shultz Center pass will be admitted (during regular weekday hours, 8:15 a.m. to 5:00 p.m.) to the Overseas Briefing Center (OBC) with a photo ID. Call (703) 302-7277 for information regarding after-hours entry.

Information and Training

- Consult your Career Development Officer (CDO) in Main State and the Shultz Center as soon as possible to arrange for professional studies, language training, and area studies. Arrange for adult family member language training (authorized on a space-available basis). Inquire about the use of the Shultz Center language laboratory for self-study if classroom training is not possible.
- Visit the Transition Center's (TC) Overseas Briefing Center (OBC) at the Shultz Center to prepare for bidding or learn about living conditions at your new post. The OBC operates as a drop-in facility. It is open Monday through Friday from 8:15 am to 5:00 pm as well as on select Saturdays and Wednesday evenings. For more information check http://www.state.gov/m/fsi/tc/ or e-mail FsiobcInfoCenter@state.gov.
- () See Chapter 24, "Helpful Resources" for additional sources of information and telephone numbers.
- () Enroll in courses at the TC's Training Division.

The Training Division (TC/T) offers programs and special events designed to meet the diverse needs of employees and family members preparing for an overseas assignment or returning to the United States. Courses are offered Monday through Friday and on select Saturdays and Wednesday evenings. Prior registration is required. For current course listings and schedules call 703-302-7268 or e-mail FSITCTraining@state.gov.

TC/T also offers security training, some of which is required. To attend the Security Overseas Seminar, prior registration is required. For details call 703-302-7269 or e-mail FSISOS@state.gov.

Medical/Health

1.	rearear			
()	Make appointments well in advance for any required examinations for overseas clearance with the Department of State's Office of Medical Services, Columbia Plaza (SA-1), Room L201. Please note that children under the age of six must be examined by a private health care provider.		
()	Allow adequate time for updating immunizations. Shots are given at three Health Clinics located at Columbia Plaza, the Shultz Center, and SA-44. See Chapter 5, "Medical Information."		
()	Schedule necessary appointments with personal physicians, specialists, and dentists.		
()	Request copies of records, x-rays, and prescriptions to take with you.		
()	Instruct your physician to forward to the Office of Medical Services any information regarding your health that you wish incorporated into your records.		
()	Ask your dentist and pediatrician for instructions on fluoride treatment/tablets and other health and dental care needs for children while abroad.		
()	Schedule eye examinations for all family members, including children.		
()	Obtain extra pairs of glasses and contact lenses, as well as duplicate prescriptions, for all family members using them.		
()	Arrange with your health plan, an online drugstore, or a local pharmacy to have needed prescription drugs and toiletries sent, periodically or upon request. See also Chapter 2, "Mail and Pouch Services."		
()	Ascertain that you have appropriate health insurance coverage for the entire family. Do not discontinue your personal coverage when you go overseas.		
Household Effects and Inventory				
()	Survey your possessions and decide which items you plan to put into storage or ship to your post. If necessary, make arrangements to have them cleaned and repaired.		
()	Dispose of items you do not wish to keep.		
()	Prepare a detailed inventory of all household and personal possessions, both for your own use and to make an accurate estimate of their value for insurance purposes. Make a duplicate of your inventory list. Plan to take one copy with you and leave the duplicate in your safe deposit box or with a relative or lawyer for safekeeping in the United States. See also the "Personal Inventory" section of Chapter 11, "Packing to Go."		

()	Obtain a written appraisal for valuable items such as antiques, silver, furs, jewelry, musical instruments, carpets, and paintings. Insurance companies may require an appraisal every two years.				
Iı	Important Papers and Records					
()	Draw up a power of attorney to be left with a lawyer, relative, or friend so that you have someone who can act legally on your behalf while you are abroad.				
()	Update the will of each adult member of your family. Have it properly witnessed, with the original placed in a safe repository or with a responsible person in the United States. Keep a copy in your possession.				
()	Rent a safe deposit box to store important records and make arrangements for your spouse and another relative, friend, or your attorney to have access to it.				
()	Draw up a "letter of instruction" to be followed in the event of death (with a copy for your lawyer, relative, or friend), including funeral arrangements preferred and names, addresses, and telephone numbers of relatives and close friends to be notified. The "letter of instruction" is not a legal document and does not substitute for a legal will.				
В	anking					
()	Arrange for all regularly recurring direct deposits (i.e., salary, rental)				
()	Arrange for all automatic deductions (i.e., mortgage, student loans)				
()	Confirm account has overdraft protection				
()	Obtain overseas PIN number				
()	Request credit files/confirm credit ratings				
S	hoppin	g				
()	Notify all department stores with which you have an account of change-of-address.				
()	Check the Post Report and post briefing boxes for any essential items that are unavailable or prohibitively expensive at your post.				
()	Verify post options for receiving packages.				
()	Investigate online shopping options.				
()	Consider making contact with a personal shopper. Make an appointment before departure to familiarize the shopper with your preferences. Once you are overseas, your orders can easily be placed by phone, mail, or e-mail.				
()	Get catalogs from your favorite mail-order stores and set up charge accounts if relevant.				

() Arrange to have business cards (or personal cards) printed. See the Transition Center's publication, *Protocol for the Modern Diplomat*. E-mail FSIOBCInfoCenter@state.gov for a copy or see http://www.state.gov/documents/organization/15742.pdf.

Travel Plans

() Make reservations for the entire family through the American Express Ticket Office, Room 1243, Department of State, when your assignment is known. Office hours are 7:00 a.m.–6:00 p.m. weekdays. Call (202) 647-8497 or (800) 752-2320.

You can also contact the American Express Travel Office at the Schultz Center, Room E1113, 4000 Arlington Boulevard, Arlington, VA. Office hours are 8:30 a.m.—4:00 p.m. weekdays. Call (703) 302-6825.

For USAID, make reservations at the Sato Travel Office next to the Lafayette Federal Credit Union on the concourse level of the Ronald Reagan Building (1300 Pennsylvania Avenue). Office hours are 8:00 a.m.—5:00 p.m. weekdays. Call (202) 216-9680 or (877) 883-5136 or visit www.satotravel.com.

() If shipping a pet, request information on layovers and pet care facilities and make reservations for your animal(s). For details, see Chapter 9, "Traveling with Pets." Note: The U.S. Government reimburses the cost of shipping family domestic pet(s) in conjunction with post assignment transfer. The cost of commercial pet shipment is often sufficiently expensive as to warrant making an itemized claim for the miscellaneous portion of the transfer allowance, subject to certain limitations.

Pets

- () Visit the Overseas Briefing Center to inquire about entry requirements for different countries. Call the appropriate embassy in Washington to confirm requirements, including how close to departure the required examination and shots must be scheduled.
- () Arrange with your veterinarian for required shots and certificates. Make boarding arrangements if they will be necessary.
- () Some countries require a Certification of the Veterinarian's Examination Statement. For details see Chapter 9, "Traveling with Pets."

Plan for Shipment of Automobile (see also Chapter 8, "Automobiles")

- () Confirm with the Administrative Officer that the automobile you plan to take is acceptable and appropriate at your post.
- () Purchase select spare parts if you are going to a post with minimal service facilities.
- () If retaining your U.S. auto insurance, check to see that it covers the country of destination. If you insure abroad, some insurance companies will give reduced rates if you produce a letter from your U.S. company showing a no-accident

record. Check the OBC Post Box or ask the Administrative Officer to find out what type of insurance is required by the host country.

The OBC has several brochures on automobile insurance.

- () The Transportation Operations Office will provide an Automobile Shipment Form and information on how to plan car shipment. Call (202) 647-4140 or (800) 424-2947.
- () Make a note of your serial and motor numbers.
- () Make arrangements for the removal of the catalytic converter from your automobile, if unleaded gasoline is not available at your post of assignment. Be certain that removal of the catalytic converter from the particular make and model of your car will not damage the engine. The Transportation Operations Office issues the "letter of authorization" for removal from the Environmental Protection Agency. This office can also provide information on a Washington area company that performs this service. Verify that it is really necessary to remove the catalytic converter before you proceed—policies may have changed since the last post report.
- Arrange with the U.S. Despatch Agent (DA) for shipment of your car after receiving travel orders. The DA will select a "drive-away" firm to drive your car to the port of Baltimore, or you can drive it yourself. Remove any loose equipment (tires or tools) for shipment in the household effects.
- () The automobile must be registered in the name of the employee. If the car is still being financed, be sure that the lien holder will permit the car to be taken overseas.

Driver's Licenses

- () If possible in your state of domicile, renew your license so it will be valid when you return to the United States. A current U.S. license facilitates obtaining a license to drive in many other countries and is needed should you return to the States for home leave or any other reason during your assignment abroad.
- () Check renewal procedures for your state of issuance to learn whether you must appear in person to renew your driver's license. Explain your situation and explore the possibility of having your license renewal mailed to you overseas.
- () If you wish to obtain an international driver's permit, the American Automobile Association (AAA) (http://www.aaa.com) provides this service. In order to obtain one, you must have a valid U.S. driver's license. The Overseas Briefing Center has AAA application forms available. International permits are valid for one year only.

Absentee Voting

() Check absentee voting procedures in the state where you vote to determine if any special registration is required. See http://www.myabsenteeballot.com.

Obtain an address to write for absentee ballots. Voting is an important factor in maintaining your state of domicile.

Eligible Family Member Employment

- Eligible family members are encouraged to meet with the Employment Program Specialist at the Family Liaison Office (http://www.state.gov/m/dghr/flo/) or Room 1239, Main State, about employment possibilities at your next post, before heading overseas. Inquire about the Family Member Appointment (FMA) program, and other options for overseas employment.
- () Check the briefing boxes at the Overseas Briefing Center and post newsletters for summaries of post employment opportunities.

Schools

- () Notify your children's school of impending travel plans in the event special examinations must be scheduled to allow completion of term work. Request grade reports, test results, teacher evaluations, and samples of work, to facilitate grade placement at your post. If your child will be applying for admission to a university in the coming year, request recommendations from those teachers and counselors who know your child well.
- Check the Post Report and post-specific education information at the Overseas Briefing Center. (For more information, see Chapter 16, "Education for Foreign Service Children.")
- () Consult with the Department of State's Office of Overseas Schools at http://www.state.gov/m/a/os/ for specific information about schools at post.
- () Make application(s) to school(s) and make a selection, when possible, prior to your arrival. Notify the school of your anticipated date of arrival and request that space be reserved at the appropriate grade level for your children. If your post has a Community Liaison Office Coordinator, he/she might be able to assist with advance registration.
- Obtain information on special education facilities, summer camps, boarding schools, college placement, or educational testing by contacting the Education and Youth Officer at the Family Liaison Office.

Change-of-Address

- Obtain change-of-address kits from the U.S. Postal Service or online at http://www.usps.com.
- () Send change-of-address forms to your local post office, federal and state income tax bureaus, County Treasurer, mortgage company, Department of Motor Vehicles, magazine subscriptions, book clubs, insurance companies,

investment firms, credit card companies, your college or university, stores where you have accounts, and any companies in which you own stock.

() Make address changes, when possible, at least one month prior to departure. Listing the addresses that you need to change in a small notebook or maintaining them on your computer will facilitate notification each time you move.

E-mail Address Changes

- Since most e-mail services do not forward messages after you have moved, it may be most helpful to obtain a "permanent" e-mail address well before leaving. Options include:
 - selecting a service that provides e-mail on the Web (search the Internet for "Web-based e-mail)
 - using a forwarding service (use a search engine to find "e-mail forwarding). Also, many universities provide this service for their alumni), or
 - obtaining your own domain name with a permanent e-mail address.

By using one of these options, you will not have to send out repeated e-mail address changes.

- () If you have chosen a "permanent" option, notify everyone in your online address book at least one month prior to departure. Notify others that may have your old address (online stores, directories of different kinds, and so on).
- () If you will be using a local e-mail address at post, send address changes as soon as your new address is functional. You may want to keep your old address for a few months to make sure that everyone has your new address; either pay international telephone charges to dial into your old access line or find out if there is a way to access your account via the World Wide Web.

Letters to Post

- () If you are the employee, you should write a letter to the Chief of Mission or Principal Officer at the post to report your assignment and the anticipation with which you look forward to joining the staff. This is an official letter and should be written on official letterhead. Obtain the Overseas Briefing Center handout "Writing to Your Post of Assignment" either by e-mailing FSIOBCInfoCenter@state.gov or checking http://www.state.gov/m/fsi/tc/1876.htm.
- () A similar letter between the employee's spouse and the spouse of the Chief of Mission or Principal Officer is an unofficial but courteous gesture.
- () Write to the person you are replacing and/or the Community Liaison Office Coordinator (CLO), if the post has one. Introduce yourself and ask for a prearrival packet and any additional information that addresses your particular concerns. Remember that arrival over the weekend may not be convenient for post.
- Write via e-mail to the Administrative Officer informing him/her of your assignment, estimated time of arrival, number of family members who will be accompanying you, and your mode of travel. Inform the post administrative

- staff well in advance of arrival if you are traveling with pets and ask if you need to make any special arrangements for their entry and boarding.
- Any domestic staff that may accompany you at post must be cleared in advance with post administrative staff. In addition, you should call the appropriate embassy in Washington for specific information on entry/visa requirements.

WHEN YOU HAVE YOUR TRAVEL ORDERS

Passports

- () Apply for your family's passports. Applications can be filled out and signed from 9:00 a.m. to 2:45 p.m. in the Employee Services Center, Passport Office, Room 1252, Department of State. Call (202) 647-3433. You must present your travel orders. First-time applicants must also present proof of U.S. citizenship (certified copy of birth certificate or naturalization papers). For renewal, a former U.S. passport is sufficient. Passport applications may also be obtained and submitted at 1111 -19th Street, NW, Washington, DC, from 8:15 a.m. to 4:30 p.m. Call (202) 955-0198.
- Plan to have passports made for each child. Children should have individual passports in the event a parent or parents must make an emergency trip home alone. If children are on the parent's passport, neither the parent nor the children can travel outside the country of assignment independently.
- You can have your digitalized passport photographs taken in Room B266 by the joggers' entrance of Main State at C and 23rd Streets. Ask for additional copies for each family member. These photos will be needed for obtaining visas or identification cards while you are abroad. If your post has requested more photos than the ID unit can provide, place your photos on a sheet of paper and use the photo duplication (*not* photocopy) machines at stores such as Wal-Mart or Motophoto to make additional sheets as needed.
- () The Passport Office, Employee Services Center, or the Post Management Officer can assist you in arranging for visas for countries you will transit as well as for the country of destination. This should be done as early as possible, since it may take a long time to get visas for some countries.

Currency

- () Check to see if any countries you plan to visit en route have laws prohibiting the entry or withdrawal of even small sums of local or foreign currency.
- Obtain a supply of the local currency (if not prohibited) for those countries you will visit en route to post and sufficient money to cover initial expenses at post (such as tips, taxis, meals) in the event you are not immediately able to cash a traveler's check. Foreign currency is available at international airports and at several Washington area banks, including the State Department branch of Bank of America in Foggy Bottom. Contact the bank in advance to tell them the currencies and amounts you need.

Purchase traveler's checks. For convenience they are available at Bank of America and the State Department Federal Credit Union, also in Foggy Bottom. It is helpful to have some checks in small denominations.

Finances

- () Anticipate heavy initial expenses at post, such as membership in embassy associations, rental car expenses, or a rent deposit in advance for a privately negotiated lease. Arrange your personal finances to meet such needs, if necessary.
- () Arrange for an advance on your travel allowance. State Department travelers will receive their travel advance in the form of traveler's checks.
- () Arrange for an Advance of Pay Allowance (up to three months' pay in advance upon assignment to a post in a foreign area) from the payroll office, Room 1603 in Main State. The amount advanced must be paid back to the Department over 18 pay periods. See Chapter 3, "Allowances and Benefits" for detail.
- () Arrange to pay all utility and other bills that may arrive after your departure; automatic (direct-pay) or Internet payment options can be helpful, if available. Record the monthly closing date for each credit card account. In the process of moving, and at your new post, monthly statements may arrive late. Keep all credit card receipts in order to make correct on-time payments without the statement. Again, you may want to check to see if there is a way to view your statements online.

Insurance

Examine your insurance needs: life, medical, home/rental property, automobile, household, and personal effects. Remember the need for marine/transit insurance for your automobile and household effects. See Chapter 6, "Insurance," Chapter 8, "Automobiles," and Chapter 11, "Packing to Go."

Travel Arrangements

() Request and pick up airline tickets at the appropriate ticket office. See Chapter 24, "Helpful Resources."

Accompanied Air Baggage (goes in the hold of the plane on which you travel and arrives with you) and Carry-On Baggage

- () Decide what should be included in your accompanied air baggage. Remember that this baggage may contain the only possessions you will have for several weeks, depending upon when your unaccompanied air baggage (UAB) arrives. Make sure to check on the limits for carry-on baggage. See Chapter 11, "Packing to Go."
- For accompanied air baggage, each ticket holder is permitted to travel with two suitcases, each weighing a maximum of 70 pounds for a combined weight of 140 pounds.

() Check to be sure your luggage is in good condition (in case of rough handling) and/or make the necessary repairs or purchases. Secure identification tags for each piece of luggage.

Pack Out

- () Arrange an interview with a counselor in the Transportation Office or at your designated transportation service, if employed by USAID. A Transportation Division counselor with the State Department will provide information on shipping unaccompanied air baggage and your car. The counselor will work with you and assign a packer to handle your move. See Chapters 11, "Packing to Go," and 24, "Helpful Resources" for more details.
- () Consult with Transportation personnel and read the Transportation publication *It's Your Move* for specific instructions. Call (202) 647-4140 or (800) 424-2947 to obtain a copy.
- () Decide which items will be sent by air and which by surface. Plan unaccompanied air freight items that will enable you to set up light housekeeping and meet your immediate family needs, since it might be two to five months before your surface shipment arrives. Most posts have a welcome kit that you can use until your household effects arrive.
- Arrange with the packing/storage company that you have been assigned by the Transportation Division to do a prepack survey of your goods. The company representative should include in the weight estimate all items stored in your attic or garage, as well as items yet to be purchased. The signed estimate will suggest whether you may be over- or underweight. The estimate is not binding, and all charges are based on actual weights.
- () Advise the packing company in writing of your authorized weight allowance and instruct the company that it may not ship or store any weight in excess of your allowance without your written consent.
- () Secure appropriate authorization for shipping services from the Transportation Office. That office will need a copy of your travel orders.
- Arrange with your assigned moving company for the packing of your airfreight. Ask if the movers provide waterproof cartons. Packers are required to bring a scale so that you will know when your weight limit is reached. Exceeding the air allowance is costly. Remember, though, that this weight is only approximate, as scales that are moved around cannot be calibrated. When your unaccompanied airfreight shipment is picked up, be sure to get a receipt from the air carrier or the agent. Later you can call them to get the Airway Bill of Lading (ABL) number.
- () Arrange with your assigned moving company for the packing of sea freight and storage items.
- () Advise the Transportation Operations Office of your travel plans and a telephone number and/or address where you can be reached prior to or en route to your destination.

() It is a good idea to check with the Transportation Office before you leave town to ensure there are no last-minute problems. Your effects will NOT be shipped until you pay any overweight charges or remove items to bring your shipment within the allowed weight.

Notification of Arrival

Write to the Administrative Officer at your assigned post detailing your travel arrangements (departure from the United States); en route stops; arrival date, time, carrier; number of family members accompanying you; shipping dates of your unaccompanied air and surface freight and car; and, if you are shipping a pet, when it will arrive).

Information and Emergency Notification

- () Provide your relatives with specific information on how to mail letters and packages to you at post. See Chapter 2, "Mail and Diplomatic Pouch Services."
- () Give your relatives the appropriate emergency telephone numbers so that in the event of serious illness in the family, or of a sudden death, you can be notified immediately and can receive authorization for Emergency Visitation Travel. The caller must be able to provide your name and post as well as the name, relationship, and date of death of the family member. In the case of illness, the name, address, and telephone number of the attending physician or hospital facility must be furnished. If the illness is life threatening, this information can be provided after the trip. For emergency contact numbers, see Chapter 20, "Contingency Planning."

Department of State Emergency Notification Procedure cards are available at the Employee Service Center and the Overseas Briefing Center.

APPENDIX

Safekeeping of papers and valuables

Safeguard the following items in an accessible place. Do not put them into storage with household effects. Make a copy of those you need to take with you. Some may need to be certified.

()	Birth certificate for each family member
()	Proof of marriage
()	Proof of termination of any previous marriage
()	Proof of citizenship if a naturalized citizen
()	Military service papers
	List of all bank and savings accounts (with addresses and account numbers), including names of persons authorized to make withdrawals and sign checks
$(\)$	Inventories of stored and shipped household effects
	Real estate records—deed, mortgage papers, title insurance policy, closing statement, insurance policy on house, survey of property, tax receipts, leases, building cost figures, receipts for any improvements, or cemetery deeds
$(\)$	Insurance policy on household effects
()	Policy on separately insured valuables such as furs, antiques, jewelry, paintings, with written appraisals
$(\)$	Social Security card for each family member, including cards for each child
()	List of instructions for survivors *
()	Will *
famil	e signed original wills and instructions for survivors should be left with a lawyer, y member, or friend in the United States. Also leave a copy of the "letter of uction" with someone at the embassy or mission.
()	Employment records for each adult—names, places, dates, copies of any instrument entitling employee or survivors to special benefits such as insurance, pensions, and stock options
()	Medical history of each family member that might be difficult to collect if
()	parents are unavailable or if necessary for insurance purposes
()	Income tax papers (state and federal) and significant tax returns (see Chapter 7,
()	"Income Taxes")
()	Life, medical, disability, group insurance policies—amount and beneficiary of each policy with their names and addresses. (Insurance companies generally require certified notification of death within 30 days, together with proof of
()	birth and citizenship.) Children's school records
() () ()	
$\langle \cdot \rangle$	Power of Attorney Personal address list (Make a conv. of your address book)
$\langle \cdot \rangle$	Personal address list (Make a copy of your address book.)
()	Stocks, bonds, and other securities—consider leaving these with a broker or financial advisor, in case you want to sell. Record date of purchase and cost, who purchased them and in whose name they are registered, list of stocks pledged as security for a loan, name of stockholder, and serial numbers.
()	Proof of membership in any professional, fraternal organization, or union that
` '	entitles estate to any benefits
()	List of charge accounts and credit cards with numbers

() List of all assets and liabilities, including personal debts and debts owed to you, personal valuables, with data on any insurance coverage (policy numbers and location of policies)

Papers To Take Overseas

The following are important papers and miscellany you should hand carry with you to your post. *Never* place important documents in your baggage that is checked. Keep them in your possession at all times.

()	Passport for each family member
()	International immunization record for each family member
()	Copies of insurance policies
()	Social Security cards
()	Driver's licenses
()	School records
()	Medical and dental records for each family member and current prescriptions
()	Power of attorney
()	Copy of will(s)
()	Credit cards (Internationally recognized ones are often helpful at your post.)
()	Inventories of accompanied baggage, unaccompanied air freight, surface
	shipment, and stored possessions
()	Copy of packer's inventory
()	Airway bill number and receipt for airfreight
	Extra passport-size photos for each family member for use on arrival at post
()	Travel orders
()	Car papers, including record of car serial and motor ID numbers, and extra set
	of car keys
()	Two sets of keys to your luggage, in different places
()	Business cards and/or personal cards